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Leveraging Custom GPTs for Efficient Data Cloud Implementations in RevOps

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Agenda

- Generative AI and RevOps
- Case Study: Data Cloud
- Why Custom GPTs?
- How you can do this yourself

Goals

- Explore Challenges
- Data Cloud Use Case
- Create your own GPTs
- Co-work with custom GPTs

Generative AI & Revops

What is Generative AI?

Creates **original content** in response to a user's prompt or request[1]

- Chat GPT
- Claude
- Gemini
- Copilot
- Llama 3

From: Stryker, C., & Scapicchio, M. (2024, March 22). *Generative AI*. IBM. Retrieved from https://www.ibm.com/topics/generative-ai

How will Generative AI affect the workplace?

What we've heard:

- "It will replace human jobs"
- "It is unreliable because it hallucinates"

What we know in RevOps:

- It can make us much more productive
- It is transforming **how** we work

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Early Research: Impact on Productivity 14-55%

GitHub Study (2022)[1]: Reports a productivity increase of **55%** for developers using GitHub Copilot for coding tasks

MIT Study (2023)[2]: Indicates a **37%** increase in productivity for professional writers using generative AI

National Bureau of Economic Research (2023)[3]: Shows a **14% overall productivity boost** for customer support agents using a generative AI-based assistant

Harvard Business School (2023)[4]**:** Provides **field experimental evidence** showing that generative AI improves both productivity and the quality of work for knowledge workers.

ILO Report (2024)[5]: Finds that AI can transform workflows and improve efficiency, especially in administrative, creative, and analytical roles.

See final slide for detailed citations

Transforming How we Work

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In CRM

- Interact with data in new ways
- Streamline processes
- Use natural language

External

- Increase productivity
- Become more versatile
- Reduce time to implementation
- Use natural language to build

Case Study: Data Cloud

Data Cloud Case Study: Challenges

- Short turnaround
- First implementation
- Official documentation still in development & difficult to navigate
- Advanced configuration
    - **E.g.,** Custom data intake through the ingestion API from an iPaaS platform
    - **E.g.,** Trigger a flow based on DLO record creation in near real time

Data Cloud Case Study: Meeting Challenges

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Pain Point

- **Redundant highly technical tasks.** Creating schema for each Connector. A new one was needed every time a field type needs to change.
- **Documentation missing or scattered.** Detailed information about advanced configuration was scattered in SDKs, lists of resources from events, a few instructional videos
- **Difficult to get full picture quickly**
- **Difficult to troubleshoot the unexpected**

Solution

- **Custom GPTs as Tools**
  - One for each schema structure required (YAML, JSON)
  - Gave it expertise and examples when something worked
  - Knowledge cards
- **Custom GPT Advisor/Tutor**
  - I made a custom GPT and asked it to become familiar with all the sources we had. We were able to ask it questions about the data and it could provide advice.

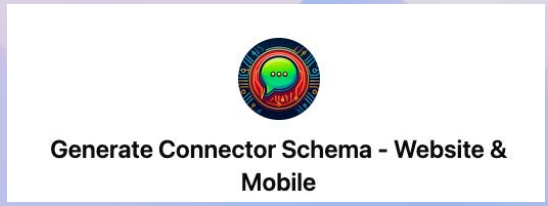
Tool-type GPTs: Repetitive, Technical Tasks

Custom GPT 1: Website & Mobile Connector (V2)

- **Inputs:** JSON payload, natural language
- **Outputs**: your schema

Custom GPT 2: Ingestion API Data Lake Object (V2)

- **Inputs:** JSON payload, natural language, field list
- **Outputs:** your schema



Explainer-type GPT: Advisor, Tutor

Custom GPT 3: The Explainer (V2)

Explain Data Cloud Intake Mapping & Harmonization

Inputs: Natural language
Outputs: Strategy, advice, tutoring explanation, troubleshooting assistance

Data Cloud Case Study: Learning Outcomes (1)

- **Custom GPTs speed up time sinks**
  - Custom GPTs can be used to speed up work on highly technical tasks that need to be repeated

- **Custom GPTs provide troubleshooting and design across systems**
  - Custom GPTs are very helpful for advising and troubleshooting complex issues across systems, where one helpdesk may not be enough

- **Custom GPTs synthesize scattered documentation**
  - Creating a Strategic Advisor and feeding it reliable sources is a very useful way to get questions answered quickly

Data Cloud Case Study: Learning Outcomes (2)

- **Writing good instruction sets is essential**
  - Vanilla GPT could not help us!
  - Feeding your GPT the right data, templates, and telling it how to help you goes a long way

- **The Custom GPT is collaborator**
  - Generative AI must still be used with a domain expert, or what salesforce likes to call a “human in the loop”.

- **Custom GPTs can offer reliability beyond standard ChatGPT**

Create Your Own Custom GPTs

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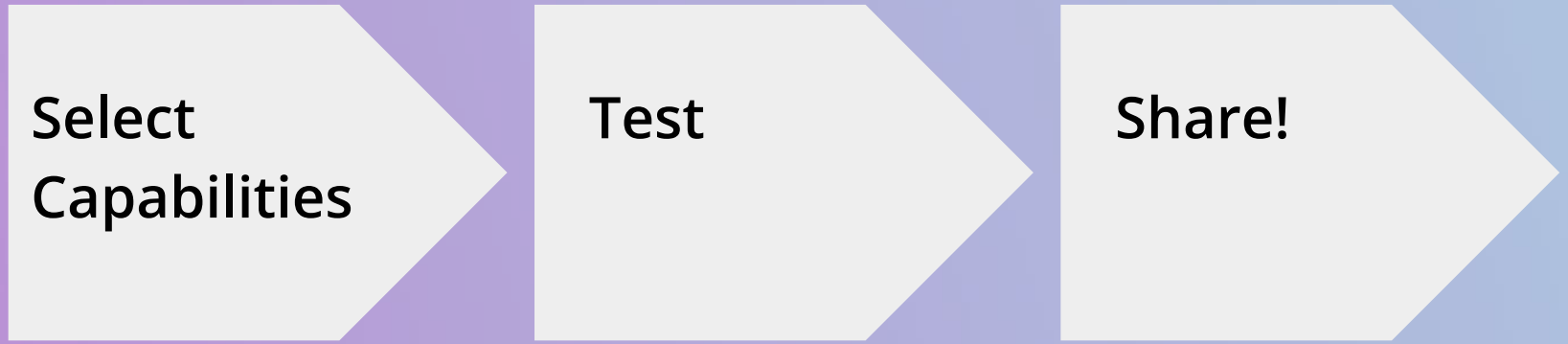
Make a Custom GPT: Process

Write an Instruction Set

Improve it with ChatGPT

Add Example Files

Make a Custom GPT: Process (cont'd)



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Write an Instruction Set: Tips

- Write it like an improv briefing (5 steps to success)
- Get advice from Chat GPT (improvements, token reduction)
- Provide examples or reference information as knowledge files (templates, guidelines)
- Ask it to proceed “step-by-step” or “line by line” for complex logic
- Self-validation

Five Steps to a First Draft

1. **Set the scene with detailed context** (*Who am I? What do I know? What areas do I have expertise in? What systems am I familiar with? What knowledge do I have that will equip me for my task? What special higher-level reasoning am I good at?)*

2. **Tell it who it is, what skills it has, and what it is trying to do** *Describe my task and who I'm completing it for. What do they already know? What don't they know that I should be aware of when trying to help my user? What do I want to achieve as an LLM helping a user?*

3. **Describe how it should interact with the audience (user)** (*Describe any human interactions I should start with and questions I should ask my user. Confirm anything I should consider when deciding what questions to ask. Tell me what I'm really good at and who I am to them (e.g., a strategic consultant, engineer, etc.). Outline any questions you want me to ask them explicitly and the conditional logic for what to do given certain answer sets.*

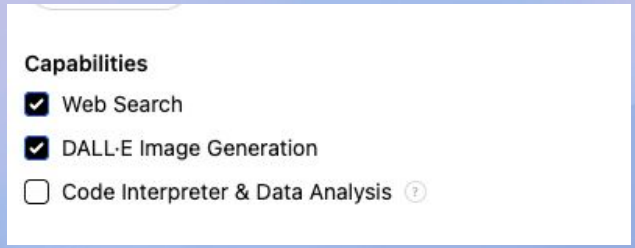
Five Steps to a First Draft (cont'd)

4. **Give it an example of what good looks like** (*Upload some example data, then tell me how and when to refer to it)*

5. **Tell it what to do when things go wrong** (*Inspire me like you would a fresh intern. Should I give up? Should I try an alternative method if the first doesn't work? When should I give up or ask for human input?)*

Final Set Up: Capabilities

- Select Web Search
- Select Code Interpreter & Data Analysis
- Do not select DALL-E Image Generation (unless you are specifically manipulating images)



Final Thoughts

- Generative AI is Co-intelligence
- Keep data privacy in mind, using AI in CRM when dealing with sensitive data
- External generative AI is useful for creating time-saving tools, developing expertise quickly, and increasing versatility

Summary

- AI is quickly changing how we work
- Writing good instructions is quickly becoming essential to revenue operations, both within CRM and externally
- Challenges to Data Cloud implementation are common RevOps challenges
- Custom GPTs can help us meet these challenges faster and more effectively than ever before
-

References: Impact Studies

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Thank You!

Questions? Please reach out!
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